

Qualifications and Capabilities

Investor Roadmap Practice

Investment Policy and Governance



TSG

The Services Group, Inc.



THE SERVICES GROUP

Qualifications and Capabilities in Investment Policy and Governance

A. Introduction to The Services Group, Inc. (TSG)

TSG is an international economic consulting firm providing governments and businesses with specialized advisory services to facilitate business expansion and economic growth. TSG brings over 20 years of experience in the design and implementation of over 600 projects in 120 countries worldwide and has established a global reputation with its clients for delivering results based on innovative solutions.

TSG assists clients in analyzing and designing policies, strategies, and procedures for government institutions and private enterprises. TSG has particular expertise in facilitating foreign direct investment (FDI), improving governance, increasing World Trade Organization-compliant trade, enhancing domestic economic competitiveness, developing special economic zones, and strengthening institutions and regulatory regimes. TSG's work has been global in scope, including projects in Asia, Africa, the Caribbean, Europe, Latin America, and the Middle East.

Client Base

TSG works primarily with multilateral financial institutions, bilateral donor agencies and developing country governments, through their ministries of commerce, industry, finance, trade, justice and other government departments. The firm's primary clients are the World Bank, the U.S. Agency for International Development (USAID), and the Asian Development Bank. Moreover, TSG has worked extensively for the International Finance Corporation, the Multilateral Investment Guaranty Agency, the U.S. Overseas Private Investment Corporation, and the United Nations Development Program. The firm also works with a select group of private corporate clients, primarily in the areas of infrastructure development and corporate location. TSG is active in all world regions, with its heaviest engagements currently in sub-Saharan Africa, East Asia and the Middle East and North Africa.

Professional Staff

TSG experts represent an unsurpassed pool of multi-disciplinary talent and expertise, including economists, investment promotion specialists, and legal experts. The TSG core staff also includes highly experienced land use planners, sectoral specialists, and economic policy analysts. An internationally recognized group of associate consultants and specialized contractors complement and enhance the technical capabilities of the core staff.

B. TSG's Investor Roadmap Practice

The past 25 years have witnessed dramatic change in the economic philosophies of many countries, with a broad consensus about the positive role of private sector led growth. Yet while many states have implemented macroeconomic reforms, liberalizing currency regimes and creating the legal framework for allowing for FDI, in many instances the formal investment response has been disappointing. One major reason for this has been the lack of focus on governance issues, including administrative and procedural barriers to investment, conflicts of

law and inadequate regulation, and inefficient bureaucratic structures. TSG offers a comprehensive approach to identify and remove barriers to investment and trade and provide technical assistance to government agencies and private sector organizations to promote investment and exports.

Investor Roadmap Methodology

TSG has developed a number of tools to help governmental agencies and departments adjust to the needs of a changing policy environment. These include thorough analytic studies, multi-phased process-reengineering interventions, and targeted customer service training programs that reduce bureaucracy, improve responsiveness and enable agencies to evolve into true service providers. The chief TSG tool for improving public sector services and a country's investment climate is the "Investor Roadmap," at once an analytic tool, a detailed prescriptive document, and catalyst for meaningful change. The Investor Roadmap involves a comprehensive analysis of the general and specialized procedures that constitute public-private regulatory interaction. Most clients request an Investor Roadmap to analyze and improve the regime for local and foreign direct investment in a given country, including a detailed description of the causes of problematic processes and specific recommendations for reform. In some cases a client will want to create an enabling environment for small to medium enterprises (SMEs) and encourage the formalization of domestic entrepreneurs, and in other cases the focus is explicitly on promoting inward FDI. While some of the administrative and procedural barriers that the Roadmap identifies may seem to be mere nuisances at first glance, taken as a whole they can become overwhelming, thereby deterring and raising the cost of investment and formalization.

TSG's Strengths in Governance and Investment Policy Roadmapping

- Global experience in international best practice in strategies for administrative and procedural reform
- Demonstrated expertise in advising a broad range of government agencies implementing process re-engineering and administrative reforms
- Ability to work effectively with local authorities in diverse environments and build consensus on work plans and strategic milestones for technical assistance
- Demonstrated capacity to facilitate public-private dialogue regarding commercial policy
- Outstanding project management and a strong commitment to local capacity building

One of the strengths of the Investor Roadmap is its emphasis on fostering actionable change. In most cases, after validating the findings of the report, two or three priority areas are chosen for additional attention through Process Improvement Workshops or other hands-on, in-country consulting as needed. In this manner, the Roadmap's focus is on the nexus of policy and process -- helping governments to improve policy implementation and procedural efficiency by restructuring regulatory agencies and processes. Areas of activity include analyzing and redirecting policies to better achieve their objectives, reengineering the public sector and civil service, upgrading and streamlining investment regulation and procedures, introducing e-government solutions, and improving governmental transparency and accountability at the national, regional and municipal levels. TSG has helped governments reengineer and enhance company registration procedures, tax procedures, investment incentives, immigration processing, import clearance procedures, labor laws and policy implementation, land title issuance, environmental controls, and other regulatory and procedural areas.

TSG has conducted Investor Roadmaps in some 30 countries worldwide; the Investor Roadmaps have been very effective in highlighting areas of excessive bureaucracy and burdensome regulations that constrain private investment and in taking concrete steps to remove these impediments. Typically, the Roadmap looks at foreign investment, but the methodology has been adapted to focus on local firms, sectoral investors, women, and

investors in particular regions. As an analytic tool the Roadmap is designed to thoroughly map out all of the steps, costs, submission requirements, and timeframes required of a firm to start and operate legally, noting procedural inefficiencies and problems related to policy implementation. As an instrument for change, the Investor Roadmap is designed to identify specific impediments and work with government to remove them through targeted process re-engineering interventions, including fielding technical advisers, conducting workshops, drafting model legislation, and providing training designed to build institutional capacity and implement new procedures.

The Roadmap diagnostic is designed to address the core procedures required of a firm to start up and operate a private enterprise in a given country. While some of these individual procedures may vary from country to country, the typical Roadmap project categorizes investor interactions with government into four general Process Group Areas that are typically sub-divided further into approximately 16 individual procedures, as follows:

- **Employing** issues, including acquiring investor visas, expatriate work, and residence permits; and hiring and terminating local labor.
- **Locating** issues, including purchasing and leasing land; developing a site, including obtaining building and occupation permits; obtaining utility hook-ups; and complying with environmental regulations.
- **Reporting** issues, including registering and incorporating a business; registering patents, trademarks, and copyrights; obtaining sectoral and general licenses and permits; and qualifying for incentives.
- **Operating** issues, including importing and exporting; currency repatriation and conversion; tax payment and registration; and resolving commercial disputes.

TSG's Investor Roadmap projects are normally divided into two distinct phases. Phase I involves conducting a thorough diagnostic in the field and producing a Roadmap of the procedures related to investment as well as a detailed analysis of the constraints facing the entrepreneur. The first phase also usually identifies all of the government agencies that regulate investors, characterizes the nature of public-private interactions, and presents an overview of the country's investment climate. To the extent possible, examples of international best practice in public management and regulation are cited to draw comparisons and provide examples of alternatives.

The TSG Phase I approach depends heavily on direct interviewing and outreach activities, including one-on-one interviews and Private Sector Focus Groups with entrepreneurs, government officials, business and community groups, and other stakeholders. TSG supplements this primary research with a thorough review and analysis of laws, regulations, government policy statements, and other secondary sources. During Phase I the Roadmap Team also builds consensus about the existence and impact of administrative barriers, increases buy-in for change, and allows for procedural information to be confirmed among implementing government officials through Public Sector Validation Sessions.

Phase II is focused on implementing changes to improve the investment climate, and as such it can take on many forms. In some instances, a long-term institutional advisor is placed in a government agency to shepherd through a series of institutional and management reforms. In

other cases, short-term technical experts are deployed to complete on-site training programs, multi-agency Process Improvement Workshops, or in-depth issue-specific position papers to guide government decision-making. Other implementation options include working directly with entrepreneurs to provide training and skills development, facilitate trade networking and business-to-business communication, or advise private sector associations and interest groups on strategies to increase the effectiveness of advocacy activities.

Although it has traditionally been used as a tool to boost foreign direct investment the Roadmap can be tailored to address specific subjects. Indeed, the adaptability of the Roadmap methodology has been demonstrated in many countries with varying levels of economic development. For example, the Investor Roadmap has been successfully adapted to examine governance and regulatory issues at the local level in Kazakhstan, South Africa, and Tanzania. It has been tailored to focus on specific economic sectors, such as agriculture and tourism, most recently in Zambia. In Jordan and Malawi, whole process group areas were designated for specific attention during the implementation phase. Typical variations of the Roadmap include the following:

- Converting from informal to formal status for microenterprises;
- Focusing on impediments facing small to medium enterprises (SMEs);
- Specific sectoral approaches such as for agriculture, tourism, or oil and gas sector investors;
- Barriers faced by particular population categories, for instance women entrepreneurs; and
- Different regions of the country, including provinces and municipalities.

D. Previous Investor Roadmap Experience

TSG has a proven track record in successfully completing Investor Roadmaps around the globe. TSG's Investment Policy and Governance practice group has conducted nearly 40 Roadmap exercises, including Roadmap diagnostic studies, implementation projects based on the Roadmap recommendations, and Roadmap project assessment missions in some 30 countries in Eastern Europe, Asia, the Caribbean, Africa, the Middle East, and Latin America. A sampling of these projects is described below:

- **Kuwait Administrative Barriers Diagnostic.** TSG staffed and managed a seven-member team to conduct an administrative barriers diagnostic of the regulatory, bureaucratic, and policy impediments to business startup and operations in Kuwait, with particular emphasis on the prospects for foreign direct investment. Issues examined include foreign investor entry, company registration, acquiring incentives, acquiring land, site development, environmental clearance, utilities hookups, obtaining expatriate visas and work permits, Kuwait labor procedures and law, tax registration and payment, and importing and exporting. (Foreign Investment Advisory Service/World Bank, 2002-present)
- **Jordan 2002 Investor Roadmap.** TSG staffed and managed a six-person team to conduct an Investor Roadmap diagnostic of the regulatory and administrative impediments to business startup, operations, and trade. Issues examined include company registration, municipal and ministerial licensing, acquiring incentives, acquiring land, site development, environmental clearance, utilities hookups, obtaining expatriate visas and work permits, local labor procedures and law, tax registration and payment, importing and exporting, complying with industrial standards, and inspections. The findings of the report informed

several aspects of the work plan of the Achievement of Market-Friendly Initiatives and Results Program (AMIR), including issues related to licenses, expatriate work permits, and Jordanian investment promotion strategy. (USAID, 2002-present)

- **Morocco Investor Roadmap Improved Land Use Project.** Championed by the Royal Investment Council within the Palace and the Prime Minister's Office, MIR III is a 20-month, \$1.5 million Process Re-engineering pilot and legal reform effort in land acquisition, and site and Private Industrial Park development, procedures in the Moroccan Governorates of Souss-Massa-Drâa and Tangiers-Tétouan. The TSG Project Team developed a series of detailed "Locating in Morocco" Guides, provided legal reform recommendations with respect to planning and site development, designed a regulatory framework for private industrial parks (presented to Government through the Ministry of Industry), provided institutional designs and training in connection with the launch of a One-Stop-Shop for Investment, and implemented the first multi-agency/public access GIS in Morocco. (USAID, 2000-present)
- **Nigeria Investor Roadmap Diagnostic.** TSG performed roadmap analysis identifying all the steps necessary for a business to become legally established in Nigeria, identified and assessed regulatory bottlenecks, and recommended reforms to streamline investor start-up and business operations, comparing business start-up and process delays in Nigeria with international best practice. TSG also delivered two Reports focusing on Nigeria's distinctive state and regional differences in various areas of Government service delivery to investors, including in the provision of telecommunications infrastructure and enhanced-infrastructure Free Zones. Subsequently, TSG presented findings at a series of workshops co-sponsored by the US Embassy, the World Bank, the IFC (FIAS), USAID, and Nigeria's National Economic Summit Group (NESG), to catalyze change in Africa's most populous country. (USAID/IFC, 2000-present).
- **Kuwait Investment Environment Diagnostic.** TSG, under a subcontract to Foreign Investment Advisory Service (FIAS), carried out a diagnostic of the conditions encountered by investors in Kuwait, as preparation for a later administrative barriers study. The diagnostic involved a detailed review of the investment law and the development of a by-law to set out the parameters for good practices in the area of investor licensing. The diagnostic also included an analysis of the tax and customs regimes, and a review of the Foreign Investment Capital Office, the newly-formed body set up to promote inward investment. (Foreign Investment Advisory Service/World Bank, 2002-present)
- **Jordan Investor Roadmap Implementation Assessment.** TSG conducted an assessment of the regulatory and administrative improvements in Jordan from 1998-2002 based on the conclusions of the World Bank/USAID Investor Roadmap of Jordan. Issues examined include company registration and licensing, acquiring land, site development, environmental clearance, utilities hookups, obtaining expatriate work permits, tax administration, importing and exporting, and standards. TSG wrote an analysis of the success of implementation initiatives under the Achievement of Market-Friendly Initiatives and Results Program (AMIR) and a Terms of Reference for a revised Investor Roadmap diagnostic and implementation activities. (USAID, 2002)
- **Saudi Arabia Administrative Barriers Diagnostic.** TSG conducted a national diagnostic of the Saudi Arabian investment climate. The diagnostic included an assessment of Saudi Arabia's legal regime for investment and business operations, institutional constraints to effective promotion and facilitation of investment, regulatory and administrative barriers to

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business expansion and start-up, and the current incentives regime. The study involved extensive meetings with senior government officials, international donors, and representatives of the private sector. In particular, TSG focused on the process of acquiring land, developing a site, completing utility hook-ups, and complying with environmental regulations. (World Bank, 2001-2002)

- **Kazakhstan Private Sector Assessment.** TSG prepared a countrywide Private sector assessment based on available country data, existing studies undertaken by ADB and other donors and discussions with relevant public and private entities. (Asian Development Bank, 2001-02)
- **Kazakhstan SME Roadmap Diagnostic and Implementation.** Following the pilot Investor Roadmap in the South Kazakhstan Oblast, TSG conducted a countrywide Roadmap diagnostic and implementation project focused specifically on SME development, public sector capacity building, and regulatory reform at the local (oblast) level. The project was based out of three oblast capitals (Aktau, Atyrau, and Ust-Kamenogorsk) and programmed a series of research, outreach, and implementation activities sequentially across the country in the three chosen oblasts. The project team of 14 produced three comprehensive regional Investor Roadmap diagnostic reports and conducted a series of presentations and outreach events to mobilize support among SMEs and local officials to re-engineer procedures and increase transparency. Implementation work focused on standards and testing capacity, land use and site development policy, and revamping SME tax administration. (USAID 2000-2001)
- **Jordan Investor Roadmap Implementation Project.** Following the World Bank-financed Roadmap analysis, TSG designed and led process improvement and customer service training exercises to re-engineer the company registration process. Additional process improvement exercises were programmed to create new regulations and coordinating mechanisms governing business licensing and the environmental clearance regime. After the Roadmap noted weaknesses in Jordan's standards framework, TSG, through USAID's AMIR project, conducted research for and managed implementation of regulatory reforms related to environmental compliance, and food industry inspections. TSG also worked with the Jordanian Government to amend the existing customs incentives and bank-guarantee schemes. After the original Roadmap noted weaknesses in Jordan's trade and investment framework, TSG, once again through USAID's AMIR project, assisted the Government of Jordan in successfully joining the WTO, under the fastest accession process ever managed in GATT/WTO's history. (USAID, 1998-ongoing)
- **Angola Investor Roadmap Diagnostic.** TSG identified all the steps, costs, and difficulties in establishing formal sector enterprises in Angola. The Roadmap served as a tool to encourage the Angolan Government to reconsider current practices and shift to a more service-oriented business environment. (USAID, 2001)
- **Malawi Investor Roadmap Diagnostic, Assessment, and Implementation Project.** TSG undertook an Investor Roadmap update project to assess the pace of second tier economic reforms and program appropriate follow-on process improvement activities. TSG identified bottlenecks facing local and foreign investors, and worked toward methods of reducing them. TSG built support among key government leaders in order to develop momentum for change and transferred skills to continue the reform efforts to local consultants. Process

Improvement Workshops were conducted on land use and site development and immigration and labor policy and administration. (USAID, 2000)

- **Algeria Investor Roadmap Diagnostic.** TSG identified the necessary steps to establish a legitimate business in Algeria. The study focused on the highly regulated and difficult-to-enter financial, pharmaceutical, and telecommunications sectors. The study identified regulatory bottlenecks, recommended reforms to streamline investor start-up, and compared business start-up and process delays in Algeria with other regional countries. (USAID, 1999-2000)
- **Kazakhstan Oblast Investor Roadmap Diagnostic.** TSG conducted an oblast level Investor Roadmap diagnostic to assess the business climate at the local level. TSG evaluated the extent to which oblast and regional officials were implementing national level reforms. The diagnostic report noted regulatory bottlenecks, recommended reforms to streamline investor start-up, and compared the cost, timeframe, and ease of starting up and expanding a business across regions within the South Kazakhstan Oblast. (USAID, 1999-2000)
- **Morocco Investor Roadmap Implementation Project.** TSG identified opportunities for reform in all the steps necessary for a business to become legally established in Morocco. Extensive benchmarking against Northern Mediterranean countries was conducted in this regard. The study recommended reforms to streamline investor start-up and developed a detailed time-bound action plan for reform. Findings were presented at a series of workshops co-sponsored by the US Embassy, USAID/Rabat and the Government of Morocco. (USAID, 1999-2000)
- **Tunisia Investor Roadmap Diagnostic.** TSG identified opportunities for reform in all the steps necessary for a business to become legally established in Tunisia. The study focused on export-oriented and industrial investment sectors, as well as services (including tourism, telecommunications, finance and pharmaceuticals) and oil & gas. Following benchmarking against international best practice among Government agencies, the study recommended reforms to streamline investor start-up and developed a detailed time bound action plan for reform. TSG subsequently presented findings at workshops sponsored by the US Embassy, regional AMCHAMs and the Tunisian Ministry of International Cooperation & Foreign Investment (USAID, 1999-2000).
- **Bulgaria Administrative Barriers Diagnostic.** TSG worked closely with government agencies at the municipal and national levels to help them identify and eliminate regulatory bottlenecks facing foreign and local investors in Bulgaria. The objective was to clearly identify the impediments to the formal establishment and operation of businesses, and procedures that conflict with EU norms. Specific focus was on banking, insurance, and food manufacturing sectors. (FIAS and Bulgarian Foreign Investment Agency, 1999)
- **Romania Administrative Barriers Diagnostic.** TSG identified and analyzed the regulatory and administrative barriers to local and foreign investment in Romania, concentrating on land accession and site development issues. High-ranking government officials and major investors in Romania were interviewed to identify bottlenecks with existing procedures. The study compared Romania with other countries in terms of business environment and made recommendations based on international best practices. (FIAS, 1999)

- **Senegal Investor Roadmap Reform Implementation Study and Training.** In July 1999, TSG conducted a follow-on activity to the 1998 FIAS-sponsored Investor Roadmap, with the aim of building capacity for reform implementation through a "Best Practices Study Tour" to Ghana and Tunisia, providing Government Reform Steering Committee members with exposure to regional best practices in effective service delivery to investors and re-investing Government. Findings were presented at a series of workshops co-sponsored by USAID/Dakar and the Senegalese Prime Minister's Office. The delegates implemented several TSG-recommended reforms, including at the Senegal One-Stop-Shop, within weeks of project completion. (USAID, 1999)
- **Mozambique Internet Investment Start-up Project.** TSG conducted a project, which, following initial diagnostic and design work, enabled international investors to access an official Government of Mozambique site containing information about investment procedures and company formation. The site also provides access to various permit application forms on-line and facilitates the process of becoming fully licensed and accomplishing other investment procedures. The TSG-designed system was installed in various private accounting firms and at the Mozambique Investment Promotion Centre. (World Bank, 1998-1999)
- **Tanzania Investor Roadmap Assessment Project.** TSG designed and conducted an assessment mission of TSG's 1996 Investor Roadmap of Tanzania. TSG also updated the Investor Roadmap document through extensive interviews, validation sessions, and focus groups with the public and private sector. Subsequently, TSG organized and led workshops for public and private sector audiences to publicize the status of regulatory reform efforts. TSG also documented the findings in an evaluation report and managed the completion of and wrote a final report for the Roadmap project for consideration by USAID and the Office of the President of Tanzania. (USAID 1998)
- **Chile Investor Roadmap Benchmark.** TSG, as part of a global benchmark study, scrutinized the processes investors must complete to locate their business in Chile, employ domestic and foreign workers, register and license their business with the Chilean government, and begin operating. The objective of the study was to benchmark the step-by-step requirements entrepreneurs must complete to become operational in full compliance with all laws, regulations, procedures, and institutional practices. (USAID, 1998)
- **Hungary Investor Roadmap Benchmark.** TSG performed a study on international best practices in government efficiency and responsiveness in dealing with administrative, institutional, and regulatory barriers facing foreign direct investors in Hungary. The purpose of the study was to benchmark all the requirements companies must fulfill to become operational in full compliance with all laws, regulations, procedures, and institutional practices in Hungary (USAID, 1998).
- **Malaysia Investor Roadmap Benchmark.** As part of a global benchmarking study, TSG analyzed investment in Malaysia from the view of foreign investors to help public sector officials understand how an individual agency's policies and practices affect a broader process. The study cast government operations as an exercise in customer service with the foreign investor as the user of public services. The benchmarking exercise compiled data on how chosen agencies identified and eliminated the constraints posed by bureaucracy, regulations, and laws. (USAID, 1998)

- **Mauritius Investor Roadmap Benchmark.** TSG gathered data from the perspective of foreign investors in Mauritius to allow public sector officials to understand how regulatory bottlenecks in one agency can adversely affect the entire investment process. TSG performed an analysis on international best practices in government efficiency and responsiveness in dealing with administrative, institutional, and regulatory barriers facing foreign direct investors in Mauritius. (USAID, 1998)
- **Mongolia Investor Roadmap Diagnostic.** TSG conducted a comprehensive evaluation of administrative and procedural impediments to foreign direct investment in Mongolia, applying legal and process benchmarks from international best practices, and presented the report to the Minister of Finance and members of Parliament. (World Bank, 1998)
- **Morocco Investor Roadmap Diagnostic.** TSG completed an Investor Roadmap analysis identifying all the steps necessary for a business to become legally established and operational in Morocco. The study examined the micro-level constraints faced by both domestic and foreign investors during start-up and operation of the investment. The study recommended reforms to streamline investor start-up and compared business start-up delays in Morocco with international best practices. TSG presented the findings at a workshop sponsored by USAID/Morocco and the Moroccan Ministry of General Affairs. (USAID, 1998)
- **Bolivia Investor Roadmap Diagnostic.** TSG participated in an Investor Roadmap analysis identifying all steps necessary for a business to become legally established in the country. The study detailed the existing administrative barriers to investor entry, identified regulatory bottlenecks, and recommended reforms to streamline investor entry procedures. The diagnostic compared business start-up delays in La Paz with the industrial center of Santa Cruz and presented findings to the Vice-Minister of Industry and Trade. (FIAS and USAID, 1998)
- **Dominican Republic Investor Roadmap Diagnostic.** TSG undertook an Investor Roadmap analysis of policy, procedural, and bureaucratic barriers faced by foreign investors. TSG conducted over 50 interviews, including focus groups with both local and foreign investors located in and out of free zones. The study also analyzed a wide variety of legislative acts pertinent to investors. TSG developed recommendations for changes in the legislative and regulatory environment through participatory change management sessions with government agencies. (USAID, 1998)
- **Jordan Investor Roadmap Diagnostic.** TSG worked with the Investment Promotion Corporation in Amman and the Foreign Investment Advisory Service of the World Bank to conduct an Investor Roadmap analysis identifying all the steps necessary for a business to become legally established and operational in Jordan. The study was a red-tape analysis of existing administrative procedures and regulatory bottlenecks. TSG compared business start-up delays in Amman with other areas, recommended reforms to streamline investment start-up procedures, and presented findings to the Minister of Industry and Trade. (FIAS and USAID, 1998)
- **Kenya Investor Roadmap Implementation Project.** TSG undertook a Phase II Investor Roadmap Process Reform Program that presented the findings of Phase I to several official agencies in Nairobi, including the Ministries of Finance, Tourism, Lands and Trade, the Department of Immigration, and the Investment Promotion Center. TSG conducted process

improvement workshops to help the Department of Immigration and the Ministry of Tourism implement recommendations made in the Phase I report. The workshops identified ways to streamline procedures for obtaining "General Approvals" from the Investment Promotion Corporation (IPC) and licensing approval for tourism projects, and secured commitment from the Government of Kenya to execute proposed changes. (USAID, 1998)

- **Kenya Investor Roadmap Diagnostic.** TSG conducted a Phase I Investor Roadmap compiling data from meetings with public sector officials and private investors to identify all the steps necessary for a business to become legally established and operational in Kenya. The analysis quantified the existing establishment steps, identified regulatory bottlenecks and recommended reforms to streamline investment start-up procedures. The study also compared business start-up delays in Nairobi with the port city of Mombassa and presented findings to USAID mission in Nairobi. (USAID, 1998)
- **Latvia Administrative Barriers Diagnostic.** TSG participated in a World Bank-funded study of administrative barriers to investment. TSG analyzed the regulatory and administrative investment environment, including the country's ability to incorporate needed rules and regulations for European Union Accession and the potential impact on inward investment. A report on the investment environment with recommendations for improvement was produced. (FIAS, 1998)
- **Laos Investor Roadmap Diagnostic.** TSG undertook a comprehensive study to enhance the effectiveness of foreign investment promotion in Laos. The project, which included an Investor Roadmap analysis, focused on improving investment incentives and policies, and removing regulatory and procedural constraints to inward investment. TSG also conducted an investment targeting analysis and prepared a promotion strategy and marketing action plan. (Asian Development Bank, 1998)
- **Madagascar Investor Roadmap Diagnostic.** TSG conducted a Roadmap analysis identifying all the steps necessary for a business to become legally established and operational. The study detailed existing establishment procedures, identified regulatory bottlenecks, and recommended reforms to streamline investment start-up procedures. (USAID, 1998)
- **Senegal Administrative Barriers Diagnostic.** TSG participated in an Investor Roadmap analysis identifying all the steps necessary for a business to become legally established and operational in Senegal. TSG determined existing procedures, identified regulatory bottlenecks, compared business start-up delays in Senegal with other African countries, and recommended reforms to streamline investor start-up. (World Bank and USAID, 1998)
- **Zambia Agricultural and Tourism Sector Investor Roadmap Diagnostic and Implementation Project.** TSG undertook an Investor Roadmap project with focuses on industry and agriculture. TSG identified bottlenecks facing farmers and industrialists, and worked toward methods of reducing them. TSG built support among key government leaders in order to develop critical mass of momentum for change and transferred skills for continuing the reform efforts to local consultants. Implementation activities consisted of Process Improvement Workshops related to tourism licensing and using the Internet for enhanced public-private information dissemination. (USAID, 1998).

- **Tanzania Investor Roadmap Implementation Project.** TSG designed and conducted an implementation project in Tanzania focused on improving procedures related to municipal governance, expatriate work permit issuance, customs processing, and land allocation procedures at the local and national level. TSG conducted a series of presentations, Process Improvement Workshops, and change management interventions to improve selected procedures. Subsequently TSG established a senior level policy-oriented Steering Committee to shepherd regulatory reform through government and technical Working Groups to devise implementable solutions. TSG conducted workshops in import clearance procedures and immigration procedures to identify further improvements to make Tanzania more competitive in attracting inward investment. Recommendations included submitting draft electronic commerce legislation, formation of a government-directed process reengineering team, and further procedural enhancements to existing processes (USAID, 1997-98)
- **Draft Entrepreneur's Roadmap Guidebook** TSG prepared a draft Entrepreneur's Roadmap Guidebook, a comprehensive research report that describes the Roadmap methodology, its accomplishments and the lessons learned in TSG's execution of nearly 30 such projects worldwide. TSG also created an inventory of international best practices that can be used to establish a set of international benchmarks that will allow the Roadmap methodology to make a stronger case for regulatory reform and public sector responsiveness to entrepreneurs in countries where future Roadmap studies are undertaken (USAID and Foreign Investment Advisory Service, 1997).
- **Namibia Investor Roadmap Diagnostic.** In project implementation work subsequent to the 1996 Investor Roadmap diagnostic, TSG returned to Namibia to design and conduct customer service training workshops for 40 front-line staff members in five Namibian Government agencies involved in the investment start-up process, including: Ministry of Mines and Energy, Windhoek Municipality, Ministry of Home Affairs, Customs Department and the Ministry of Trade and Industry. TSG created a customer service-training manual to be used by trainers in these agencies to run their own workshops (USAID, 1997).
- **South Africa Provincial Investor Roadmap Diagnostic.** In South Africa TSG conducted an Investor Roadmap study of processes that must be completed by an investor to establish and operationalize business in South Africa. The study evaluated differences among the Republic's nine provinces. TSG closely examined company registration procedures and led a workshop identifying improvements to application processing. The analysis also evaluated the impact of labor unions on investment and provided recommendations for improvement (Investment South Africa, 1997).
- **Swaziland Administrative Barriers Diagnostic.** In Swaziland TSG participated in a roadmap analysis identifying all the steps necessary for a business to become legally established in Swaziland. The study detailed and analyzed existing administrative procedures, identified regulatory bottlenecks, compared business start-up delays in Swaziland with other African countries, and recommended reforms to streamline investment start-up procedures (World Bank, 1997).
- **Egyptian Agricultural Sector Investor Roadmap Diagnostic.** In Egypt TSG undertook an Agricultural Policy Reform Roadmap identifying regulatory and procedural constraints to liberalization and privatization in the cotton and rice sub-sectors by using the TSG Roadmap methodology within an overall strategic planning approach. TSG identified the steps

necessary to implement recommended regulatory and procedural reforms (World Bank, 1996-97).

- **Tanzania Investor Roadmap Diagnostic.** In Tanzania TSG conducted an Investor Roadmap analysis identifying all the steps necessary for a business to become legally established and operational in Tanzania. The analysis detailed existing establishment procedures, identified regulatory bottlenecks, compared business start-up delays in Tanzania with other African countries, and recommended reforms to streamline investor start-up procedures (USAID, 1996).
- **Namibia Investor Roadmap Diagnostic.** In Namibia TSG participated in an Investor Roadmap analysis identifying the administrative barriers faced by investors. The diagnostic report detailed existing administrative procedures and regulatory bottlenecks and recommended reforms to streamline investment start-up procedures. The report compared business start-up delays in Namibia with other African countries (World Bank, 1996).
- **Uganda Investor Roadmap Diagnostic.** In Uganda TSG led an Investor Roadmap analysis identifying all second tier, micro-level constraints faced by investors establishing and operating a business in Uganda. The study detailed and analyzed existing administrative procedures, identified regulatory bottlenecks, compared business start-up delays in Uganda with other African countries, and recommended reforms to streamline investment start-up procedures (USAID, 1996).
- **Ghana Investor Roadmap Diagnostic.** In Ghana TSG prepared a comprehensive Investor Roadmap report, which identified, described and examined each aspect of the business establishment process in Ghana. Overlaps and duplication of responsibilities were itemized; and areas in need of regulatory reform were identified. The report galvanized regulatory reform efforts in Ghana and several agencies subsequently streamlined and clarified regulatory processes (FIAS, 1995-1996).

E. Key Personnel

Peter F. Carr, Senior Investment Promotion Specialist

Peter Carr is an institutional development and policy reform specialist with more than 25 years of experience in trade policy and development, Investor Roadmap analysis and implementation, trade and investment promotion, industry sector studies, institutional development, international marketing management, and privatization worldwide. Mr. Carr has worked as an institutional development advisor and policy reform specialist for a broad range of investment and trade promotion agencies. Mr. Carr has worked in more than 30 countries and has participated in and led Investor Roadmap and administrative barriers diagnostics and implementation efforts in Kazakhstan, Kuwait, Malawi, Saudi Arabia, and Slovenia.

Sutherland Miller III, Senior Investment Policy Specialist

Mr. Sutherland Miller III is an economic policy, investment, and governance specialist. Mr. Miller has led Investor Roadmap studies, implementation efforts, project assessments, and investment promotion projects several countries worldwide as a Senior Consultant in TSG's Investment Policy and Governance Practice. Mr. Miller has conducted Phase I Investor Roadmap and administrative barrier studies in Kazakhstan, Malawi, Nigeria, Saudi Arabia, and

Zambia. He has been involved in process re-engineering, designing and leading Process Improvement Workshops, and other implementation efforts in Jordan, Kazakhstan, Malawi, Tanzania, and Zambia. In these projects, Mr. Miller focused specifically on improving procedures and policy related to company registration, food safety inspections, environmental clearance, tax administration, land allocation, issuance of expatriate employment permits, tourism licensing, and internet-based investment registration and promotion. Mr. Miller has conducted assessments of Roadmap implementation efforts in Jordan and Tanzania. Mr. Miller has also advised investment promotion agencies in strategies to streamline bureaucracy, improve investment facilitation, and target investors in Jordan, Zambia, and the West Bank and Gaza. Mr. Miller has served as a Team Leader on projects in Jordan, Malawi, the West Bank and Gaza and recently served as Chief of Party for the yearlong Removal of Investment Constraints in Kazakhstan (RICK) Project, designed as an Investor Roadmap diagnostic and implementation project.

Jean-Paul Gauthier, Senior Legal and Investment Policy Specialist

Mr. Jean-Paul Gauthier is a Manager at TSG with extensive experience in the Investor Roadmap methodology, governance and administrative reform, and institutional development. He has led over 20 teams in development assistance projects, with which he has been involved for over 12 years. As Team Leader for three phases of the USAID Morocco Investor Roadmap, he carried out an in-depth analytical and comparative review work, helped craft a national reform strategy, and designed and implemented a successful pilot reform implementation project in land use. Mr. Gauthier led teams carrying out Investor Roadmap analyses identifying all the steps necessary for a business to become legally established in Algeria and Tunisia, identified regulatory bottlenecks, and recommended reforms to streamline investor start-up. For the USAID Removal of Investment Constraints in Kazakhstan Project, he contributed specialized technical assistance in legal best practices, and Investor Roadmap implementation and training issues. He led a team performing Investor Roadmap analysis identifying all the steps necessary for a business to become legally established in Nigeria, identified and assessed regulatory bottlenecks, and recommending reforms to streamline investor start-up and business operations, comparing business start-up and process delays in Nigeria with international best practice. He has also led delegates from the Senegalese Prime Minister's Office on a regional "Investor Roadmap Best Practice" Study Tour leading to reforms in Senegal. As a commercial lawyer, Mr. Gauthier also has extensive experience in commercial law and is highly knowledgeable regarding global best practices in legal and regulatory frameworks for private sector development. Mr. Gauthier is fluent in French, Russian, and Spanish.

Santosh Hejmadi, Senior Investment Promotion and Marketing Specialist

A TSG Manager, Mr. Santosh Hejmadi is an investment promotion and marketing communications expert, specializing in the design of permitting and licensing systems and marketing of services for public agencies. He worked on the system for issuing business licenses and permitting procedures for the Aqaba Special Economic Zone Authority (ASEZA) in Jordan. He also helped develop an Investor Tracking Mechanism for ASEZA and has also worked on the monitoring and compliance system. Most recently he participated as team member on a World Bank funded administrative barriers diagnostic on behalf of the Saudi Arabian Investment Promotion Agency. He is also a team member for another World Bank led mission for the newly set up Industrial Cities and Technology Zones Authority in Saudi Arabia. His role there has been to provide technical support for the establishment of the Authority. Mr.

Hejmadi has particular expertise in designing general business and sectoral licensing regimes for foreign and indigenous investors. Prior to joining The Services Group, Mr. Hejmadi was responsible for the worldwide investment registration and promotion for the Jebel Ali Free Zone in Dubai, the United Arab Emirates.

Deborah Porte, Senior Land Use Planning and Investment Policy Specialist

TSG Senior Consultant Deborah Porte is an architect, planner, and urban designer with 15 years experience in urban and regional development, free zones, business parks, land use, master planning, regulatory systems and land/government reform. Most recently she was responsible for selecting development sites for a technology park in Sfax, Tunisia where her tasks included reviewing and analyzing site suitability, preparing development/engineering feasibility study, concept/master planning drawings, and developing cost estimates for on and off-site infrastructure. For the Removal of Investment Constraints and Barriers in Kazakhstan she reviewed and analyzed public sector applications and procedures for private sector development, assessed land allocation and site acquisition procedures and formulated new policies and development processes, zoning mechanisms, infrastructure improvements, and short and long-term strategies for implementation in the cities of Aktau and Atyrau. Ms. Porte is skilled at providing expertise on investor road maps, policy and land reform, formulating and reforming regulatory zoning, design guidelines, privatization of land, urban infrastructure, decentralizing state public enterprises, industrial business parks, and creating opportunities for private sector investment in both North America and abroad.

Julien Galant, Senior Legal and Investment Policy Specialist

Mr. Julien Galant, TSG Senior Consultant, is an attorney who has worked for both corporate and government agencies, and has completed two Investor Roadmap projects in Northern Africa and an administrative barriers diagnostic in Saudi Arabia. He is an expert in the investment law, strategic business planning, and best practices in commercial law. A former diplomatic lawyer, he has worked with the French Ministry of Foreign Affairs, and cases before the European Court of Human Rights (Strasbourg). He argued cases concerning illegal state subsidies, health policies, the electrical monopoly, social policies, agriculture, the European Food and Drug Administration (AAM), and international mergers before the European Court of Justice. Mr. Galant has counseled Cogema, Banque Nationale de Paris, GMAC and Aerospatiale on trade, acquisitions joint ventures and advised and managed marketing programs for Telecom companies in the US, Canada and France. Mr. Galant is fluent in French.

Trina Rand, Investment Policy Specialist

Ms. Trina Rand, TSG Staff Consultant, has extensive knowledge of economic and political development issues in transitional countries. She has specific knowledge of developing country settings, especially in Africa, with long-term in-region living and work experience. She has conducted analytical research on investment, including recommendations on how to access project finance and generally increase investment realization rates. She has extensive training experience, most recently training consulting team leaders on the Investor Roadmap methodology and process in Kazakhstan and as a team member for the Investor Roadmap of Nigeria. Ms. Rand has conducted research and produced analytical reports on investment law, procedures, and incentives, as well as on labor and factor costs, for the purpose of attracting

investment. She has also conducted comprehensive research of foreign direct investment into the Asian market. Ms. Rand is fluent in French.

Simeon Sahaydachny, Legal and E-government Specialist

Mr. Simeon Sahaydachny is a TSG Associate Consultant and a legal expert with over 13 years of international experience specializing in the legal, institutional and policy aspects of improving public procurement systems and e-government strategy. He has worked with TSG on Roadmap implementation projects in Jordan, Morocco, and Tanzania related to improving government systems and revising e-government legislation. He has served as a technical consultant for Governments as well as international organizations including the World Bank, the African Development Bank, the Caribbean Community, and the World Trade Organization. As a lecturer at the International Law Institute in Washington, D.C., he led training courses for Slovakian government officials on public procurement. Mr. Sahaydachny formerly served as a Senior Legal Officer in the secretariat of the United Nations Commission on International Trade Law (UNCITRAL). During that service, he was Secretary of various UNCITRAL inter-Governmental Working Groups where he was responsible for facilitating dialogue and preparing model laws. In addition to running his private practice, Mr. Sahaydachny is currently a Senior Fellow of the International Law Institute in Washington, and a member of the Foreign and Comparative Law Committee of the Association of the Bar of the City of New York. He has functional knowledge of Russian and Ukrainian.

Donaldo Hart, Investment Policy and Private Sector Development Specialist

Dr. Donaldo Hart is an accomplished development professional with special expertise in conducting Investor Roadmaps and administrative barriers diagnostics and assisting the development of SMEs. His Investor Roadmap and administrative barriers projects include work in Angola, Nigeria, and Venezuela. He has led USAID operating units to a position of leadership in private sector interventions. In 1989 he became the first long-term private sector advisor to Africa under USAID's Africa Economic Policy Reform Program. In 1992 he worked with specialized consultants to establish the legislative framework for an export-processing zone. Dr. Hart is intimately familiar with USAID policies and regulations. He has been a chief of party and a team leader on numerous USAID-funded activities. He has also collaborated closely with World Bank, IMF, UN, and numerous bilateral missions. Dr. Hart is fluent in French, Portuguese, and Spanish.

David Neubert, Agricultural Economist and Investment Specialist

Mr. David C. Neubert is an agribusiness specialist with 18 years experience in agricultural business analysis, planning, operations and evaluation. Mr. Neubert worked on TSG's Investor Roadmap of Zambia in its diagnostic phase as a sectoral specialist. He has provided services to the U.S. and international food growing, processing, cooling and marketing industries as well as public sector organizations and NGOs. Assignments have included formulation of and recommendations in the areas of strategic and operation plans, agri-sectoral reviews, acquisition analysis, technical audits, project evaluations, capital investment analysis, agri-policy analysis and market analysis. Have undertaken extensive work in agribusiness financial modeling and investment analysis. Provided research for new and existing agri-products in domestic and international markets, negotiated international agri-marketing agreements. Successfully managed agricultural business start-ups, product launches, and turnarounds, provided marketing services to regional agribusiness promotion programs. Served as technical advisor on small and large-scale agri-production, packing, processing, marketing and export

operations. Industry experience includes work with private sector, IFC, World Bank, USAID, Know-How Fund, UNHCR and NGO's. His regional experience includes projects in Asia, Africa, the Americas, Caribbean, European Union, the Balkans, and former Soviet Union.

Mr. Charles Vellutini, Legal and Public Policy Specialist

Mr. Charles Vellutini's is a specialist in public policies in transition economies, with an emphasis on private sector development issues, economic policy reform initiatives, financial institution work, and privatization. Moreover, Mr. Vellutini has a broad range on investment policy and promotion experience. He has worked as a consultant with the Foreign Investment Advisory Service of The World Bank Group in various capacities. More recently, Mr. Vellutini has participated with The Services Group, Inc. (TSG) in the Tunisia Investor Roadmap project for USAID. In his work with FIAS, and recently TSG, he has focused on re-engineering of government institutions and regulatory procedures, public sector management and investment policy. He has recently undertaken Business and Regulatory Reform Roadmap analyses and benchmarking activities in Tunisia, Senegal, and Mali. The activities have included identifying both regulatory bottlenecks and developing simplification measures for private sector development and the associated legal and regulatory issues. A Ph.D. candidate at the Universite de Paris, Sorbonne in Economics, Mr. Vellutini master of Science in Economics from Fundation Getulio Vargas in Rio de Janeiro. Mr. Vellutini is a native French speaker and is fluent in English.

For further information please contact Mr. Sutherland Miller, Senior Consultant, telephone: 1 (703) 528-7444; facsimile: 1 (703) 522-2329; e-mail smiller@tsginc.com.